

LEPG Beginning-of-Year, Midcourse, and Summative Conferences and Summative LEPG Rating Form

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How to Use This Form

Directions: Leaders and their evaluators may use this form as a guide for planning and facilitating the beginning-of-year, midcourse, and summative conference conversations, as well as calculating and recording the final summative LEPG rating. At the end of this form, there is also space to record preliminary thinking for next year's professional growth plan, based on the outcomes of this year's final summative LEPG rating.

The leader should fill out each section of the form in preparation for each of the three conferences (beginning of year, midcourse, and summative) and the final summative LEPG rating and will share a copy with the evaluator prior to each conference.

The evaluator may then use this same form to take notes in the margins (handwritten) or to add comments or track changes (using word processing software, on-screen).

Leader Name: _____

School Name: _____ **School Year:** _____

Evaluator Name: _____

Beginning-of-Year Conference

Leader’s Self-Reflection and Self-Evaluation

At the beginning of the year, the leader will use the MSFE LEPG Rubric and complete a written reflection of his or her prior performance. This reflection should focus on strengths and opportunities for growth according to LEPG Core Propositions 1–7 as well as information about student learning progress. This reflection will guide the development of professional goals for the conversation between the leader and evaluator.

Leaders should use the space in the table (the field will expand as the leader types, to provide additional space as needed), a copy of the LEPG Rubric, and any evidence from the previous school year to record their self-reflection and self-evaluation rating prior to the beginning-of-year conference, and should share a copy with the evaluator prior to that first conference. When recording strengths and areas for improvement, the leader should note any evidence supporting their self-evaluation. Specific evidence from the previous school year might include summary results of a survey, teacher student learning objective (SLO) attainment data, or an observation of a particular action using the instructional feedback observation protocol.

The evaluator may then use the leader’s completed self-reflection to both guide the conversation and take notes on the conversation as needed. Leaders and evaluators may draw upon these self-evaluation notes to develop the leader’s professional practice, school growth, and learner growth goals.

The evaluator will complete a similar form in preparation for determining the leader’s summative LEPG rating at the end of the school year.

Leader's Beginning-of-the-Year Self-Reflection and Self-Evaluation

Professional Practice		Evidence Evaluated	Self LEPG Rating
<i>Strengths</i>	<i>Areas for improvement</i>	<i>Summarize evidence below</i>	<i>Circle rating for each category.</i>
			Overall rating reflecting performance on Core Propositions 1–6 of the MSFE LEPG Rubric Ineffective = 1 Developing = 2 Effective = 3 Distinguished = 4
Professional Growth		Evidence Evaluated	Self LEPG Rating
<i>Strengths</i>	<i>Areas for improvement</i>	<i>Summarize evidence below</i>	<i>Circle rating for each category.</i>
			Overall rating reflecting performance on Core Proposition 9 of the MSFE LEPG Rubric Ineffective = 1 Developing = 2 Effective = 3 Distinguished = 4

To be filled in by leader before the beginning-of-year conference

School Conditions		Evidence Evaluated	Self LEPG Rating
<i>Strengths</i>	<i>Areas for improvement</i>	<i>Summarize evidence below</i>	<i>Circle rating for each category.</i>
			Overall rating reflecting school employee's report of school climate Low = 1 Low average = 2 High average = 3 High = 4
School Growth		Evidence Evaluated	Self LEPG Rating
<i>Strengths</i>	<i>Areas for improvement</i>	<i>Summarize evidence below</i>	<i>Circle rating for each category.</i>
			Overall rating reflecting progress on school goals Did not meet = 1 Partially met = 2 Met = 3 Exceeded = 4
Learner Growth		Evidence Evaluated	Self LEPG Rating
<i>Strengths</i>	<i>Areas for improvement</i>	<i>Summarize evidence below</i>	<i>Circle rating for each category.</i>
			Rate performance for each measure and average. Did not meet/low = 1 Partially met/low average = 2 Met/high average = 3 Exceeded/high = 4

To be filled in by leader before the beginning-of-year conference

Goal Setting for Practice Improvement and Creating a Professional Development Plan

In this section, leaders should draw upon the evidence examined through the self-reflection and self-evaluation process to develop two (2) growth goals for practice improvement. MSFE recommends that professional practice goals include at least one builder goal, which is intended to address an area of improvement, and an extender goal, which is intended to deepen knowledge and practice in an area of strength. These goals should be recorded in the first column of the Professional Practice Goals table on the following page of this form.

Goals should be specific, measurable, achievable, relevant, and time-bound (SMART), as demonstrated in the following examples. MSFE recommends aligning at least one of your professional goals to district and school priorities and the other to Core Propositions 1–6. Use the space provided in the second column of the Professional Practice Goals table to indicate any alignment.

Example 1: Between October and April, I will formally or informally observe and provide feedback to all teachers in my building on a monthly basis.

Example 2: By March 1, 2014, I will complete my professional development courses on leading the implementation of Common Core State Standards.

Based on their professional practice goals, leaders can use the third column to create a professional development plan with strategies that will support them as they work toward accomplishing their professional practice goals. This can include activities that they will do independently, with a colleague, or through organized professional development. These strategies may be things leaders are already doing or something new they would like to try.

Leaders should then identify how they will measure progress toward each goal and what evidence they will collect to demonstrate attainment, recording this in the third column of the table. Leaders should be prepared to discuss and possibly refine the goals and professional development plan with their evaluator at the beginning-of-year conference.

In this section of the LEPG Conference Form, leaders should also indicate their plans for incorporating peer review into the LEPG process.

To prepare for the beginning-of-year conference, leaders should fill out the first three columns of the table on the following page of this form and share a copy with their evaluators in advance of the conference. The evaluator may then use the completed form to guide the conversation and take notes on the conversation as needed.

To prepare for the midcourse conference, leaders will fill out the fourth column to indicate progress midyear, including what they have done so far, and evidence of this progress.

To prepare for the summative conference at the end of the year, leaders will fill out the final column to indicate the extent to which they have met the goals, including what they did and evidence of this success. Prior to each conference, the leader should resubmit this completed form to the evaluator to guide the conversation.

Peer Review

In the following space, the leader should note how he or she plans to incorporate peer review into the LEPG process. The evaluator should review and approve this plan before signing the “beginning of the year” signatures of agreement.

- | | |
|--------------------------------------------------------------------------------|---------------------------------------------------------------------------------------|
| <input type="checkbox"/> Peer review of professional development plan | <input type="checkbox"/> Peer review of leader implementation of observation protocol |
| <input type="checkbox"/> Inclusion of peers as raters in leadership 360 survey | <input type="checkbox"/> Other (describe) _____ |

Professional Practice Goals and Professional Development Plan

Check the box for the leader's plan type:

- ☐ Individualized Growth Plan¹
- ☐ Monitored Growth Plan (i.e., Improvement Plan)²

Professional Practice Goals		Professional Development Plan and Progress Across School Year		
<i>(SMART: Specific, Measurable, Achievable, Relevant, Time-Bound)</i>	<i>(Note alignment to district and school priorities, or Core Propositions 1–6)</i>	<i>(What will the leader do? AND What evidence will the leader collect to show goal has been met?)</i>	<i>(Leader should describe what has been done, and note any evidence collected that demonstrates progress against goal)</i>	<i>(Leader should describe what has been done, and note any evidence collected that demonstrates progress against goal)</i>
Builder Goal	Alignment	Implementation Strategies and Evidence of Progress	Progress at Midcourse Conference	Progress at Summative Conference

To be filled in by leader before each conference

¹ For leaders who received a “proficient,” or “distinguished” rating in the previous year.

² For leaders who received a “developing” or “ineffective” rating in the previous year. Leaders rated “ineffective” should have two “builder” goals instead of one “builder” and one “extender” goal.

Professional Practice Goals		Professional Development Plan/Progress Across School Year		
<i>(SMART: Specific, Measurable, Achievable, Relevant, Time-Bound)</i>	<i>(Note alignment to district and school priorities, or Core Propositions 1–6)</i>	<i>(What will the leader do? AND What evidence will the leader collect to show goal has been met?)</i>	<i>(Leader should describe what has been done, and note any evidence collected that demonstrates progress against goal)</i>	<i>(Leader should describe what has been done, and note any evidence collected that demonstrates progress against goal)</i>
Extender Goal	Alignment	Implementation Strategies and Evidence of Progress	Progress at Midcourse Conference	Progress at Summative Conference

To be filled in by leader before each conference

Goal-Setting for School and Learner Growth

In parallel with goal setting for practice improvement, leaders and their evaluators will identify outcome measure goals related to school improvement and student growth. The outcomes will be related directly to the school goals and SLOs, which are created by teachers and others who work with the leader. Leaders should use the space provided below to record school and learner growth goals.

Leaders should **arrive at the beginning of year conference** with some preliminary thoughts on these school and learner growth goals and should fill out all or part of this table prior to the conference. Leaders should be prepared to discuss and possibly refine these goals with their evaluator at this conference.

To **prepare for the midcourse conference**, leaders will fill out the fourth column to indicate progress midyear, including what they have done so far, and evidence of this progress. To **prepare for the summative conference** at the end of the year, leaders will fill out the final column to indicate the extent to which they have met the goals, including what they did and evidence of this success. Prior to each conference, the leader should resubmit this completed form to the evaluator to guide the conversation.

Goal	Type of Evidence	Planned Action Steps to Support Goal Attainment	Progress at Midcourse Conference	Progress at Summative Conference
<i>Specify outcome-based goal here.</i>		<i>Specify plans for resources, instructional support, training, etc. that leader will implement to support goal attainment.</i>	<i>Leader should describe what has been done and note any evidence collected that demonstrates progress against goal.</i>	<i>Leader should describe what has been done and note any evidence collected that demonstrates progress against goal.</i>
School Improvement Goal	Artifacts (see <i>Artifact Submission Form</i> for details):			

To be filled in by leader before each conference

Goal	Type of Evidence	Planned Action Steps to Support Goal Attainment	Progress at Midcourse Conference	Progress at Summative Conference
<i>Specify outcome-based goal here.</i>		<i>Specify plans for resources, instructional support, training, etc. that leader will implement to support goal attainment.</i>	<i>Leader should describe what has been done and note any evidence collected that demonstrates progress against goal.</i>	<i>Leader should describe what has been done and note any evidence collected that demonstrates progress against goal.</i>
Learner Growth Goal	School Attainment of SLOs			
Learner Growth Goal	Other learner growth measure(s) (specify here):			

To be filled in by leader before each conference

Facilitating the Beginning-of-Year Conference

During the beginning of the year conversation, leaders and their evaluators will compare their thoughts on the proposed professional practice goals and professional development plan, as well as the school and learner goals and planned action steps to support goal attainment. Throughout this conversation, leaders and evaluators should take into account current districtwide initiatives and recent achievement data.

Based on the outcomes of this conversation, the leader and evaluator may choose to refine the professional practice, school growth, or learner growth goals, and the related professional development plan.

Prior to the beginning-of-the-year conference, the leader should submit the previous form, completed, to the evaluator, outlining goals and planning to achieve the goals. Leaders may consider the following questions to prepare for the conversation with their evaluator.

The evaluator should review the completed goals and planning tables sections of the form in preparation for the conference and use the following questions to guide the beginning-of-the year conversation and take notes.

How did the leader select professional practice and school or learner growth goals? How do these goals align to the leader's strengths and areas for improvement?

What Core Propositions and district or school priorities are addressed by the goals?

Are the goals SMART?

To be filled
in by the
evaluator
during the
beginning-
of-year
conference

What evidence will be used to show the leader's progress toward meeting the goals (e.g., survey data, observations of leader in action, student learning data, artifacts)?

What professional development will the leader undertake this year to work toward achieving professional practice goals?

To be filled
in by the
evaluator
during the
beginning-
of-year
conference

Beginning-of-Year Signatures of Agreement

Upon completion of the beginning-of-year conference, the leader and evaluator should sign a completed version of this form that reflects their shared understanding of the leader's professional practice, learner growth, and student growth goals as well as the professional development plan in support of professional practice goals, and action steps, resources, or plans in support of the school and learner growth goals. This form should be revisited again at the midcourse check-in and summative conferences.

Leader Signature: _____

Date: _____

Evaluator Signature: _____

Date: _____

Midcourse Conference

In December or January of each academic year, leaders and evaluators should convene a check-in to discuss evaluation results and make midcourse adjustments to reflect emerging issues in the school or community. The 30-minute conversation should reference evidence collected thus far in the evaluation cycle. Topics of discussion should include progress on the professional development plan developed in the beginning of the year, artifacts collected during the first half of the year, and any observations that have taken place in the first half of the school year.

To prepare for the midcourse conference, leaders should gather evidence collected during the first part of the school year, including any artifacts that show evidence of meeting professional practice goals, learner growth or school growth goals, and any documentation related to leader observations by the evaluator so far. The evaluator should also collect any documentation in these areas.

Leaders should use the space provided in the Professional Development Plan table earlier in this document to plan for the midcourse conference by noting any progress made against professional practice goals, including what has been done so far and what evidence has been collected to reflect this progress. In the School and Learner Growth Goals table, leaders should document any action steps and evidence of progress toward meeting these goals. The leader should share a copy of the updated goals tables in this form with the evaluator prior to the conference.

Facilitating the Midcourse Conference

During the midcourse conference, leaders and evaluators should review the leader's progress against professional practice and learner or school growth goals, as recorded in the Professional Development Plan and Goal Setting for School and Learner Growth tables earlier in this document.

The evaluator may use the following questions to guide the midcourse conversation and take notes (the field will expand as the leader types, to provide additional space as needed).

To what extent is the leader on track to achieve the **professional practice goal(s)**? What additional supports, if any, are needed to assist the leader in meeting the goals?

What midcourse adjustments might the leader make to ensure success on the **professional practice goal(s)** by the end of the year?

Based on the evidence collected so far, to what extent is the leader on track to achieve the **school and learner growth goals**?

What midcourse adjustments might the leader make to ensure success on the **school and learner growth goals** by the end of the year?

To be filled
in by the
evaluator
during the
midcourse
conference

Midcourse Signatures of Agreement

Upon completion of the midcourse conference, the leader and evaluator should sign a completed version of this form that reflects their shared understanding of the leader's progress toward professional practice, learner growth, and school growth goals as shown in any proposed midcourse adjustments. This form should be revisited again at the summative conference.

Leader Signature: _____

Date: _____

Evaluator Signature: _____

Date: _____

End-of-Year Summative Conference

The end-of-year summative evaluation conference involves a comprehensive review of leader performance.

Prior to the scheduled conference, the leader should complete the final columns in the Professional Development Plan and Goal Setting for School and Learner Growth to record the extent to which the leader feels he or she has met each professional practice, school growth, and learner growth goal. The leader should also fill out the following leader end-of-year self-evaluation table, referencing a copy of the LEPG Rubric and other collected evidence to inform ratings.

The leader should then **resubmit this completed form to the evaluator prior to the summative conference.**

Leader End-of-Year Self-Evaluation

Professional Practice		Evidence Evaluated	Self LEPG Rating
<i>Strengths</i>	<i>Areas for improvement</i>	<i>Summarize evidence below.</i>	<i>Circle rating for each category.</i>
			Overall rating reflecting performance on Core Propositions 1–6 of the MSFE LEPG Rubric Ineffective = 1 Developing = 2 Effective = 3 Distinguished = 4
Professional Growth		Evidence Evaluated	Self LEPG Rating
<i>Strengths</i>	<i>Areas for improvement</i>	<i>Summarize evidence below.</i>	<i>Circle rating for each category.</i>
			Overall rating reflecting performance on Core Proposition 7 of the MSFE LEPG Rubric Ineffective = 1 Developing = 2 Effective = 3 Distinguished = 4

To be filled in by leader before the summative conference

School Conditions		Evidence Evaluated	Self LEPG Rating
<i>Strengths</i>	<i>Areas for improvement</i>	<i>Summarize evidence below.</i>	<i>Circle rating for each category.</i>
			Overall rating reflecting school employee's report of school climate Low = 1 Low average = 2 High average = 3 High = 4
School Growth		Evidence Evaluated	Self LEPG Rating
<i>Strengths</i>	<i>Areas for improvement</i>	<i>Summarize evidence below.</i>	<i>Circle rating for each category.</i>
			Overall rating reflecting progress on school goals Did not meet = 1 Partially met = 2 Met = 3 Exceeded = 4
Learner Growth		Evidence Evaluated	Self LEPG Rating
<i>Strengths</i>	<i>Areas for improvement</i>	<i>Summarize evidence below.</i>	<i>Circle rating for each category.</i>
			Rate performance for each measure and average. Did not meet/low = 1 Partially met /low average= 2 Met/high average = 3 Exceeded/high = 4

To be filled in by leader before the summative conference

Facilitating the Summative Conference

First, leaders and evaluators should review the leader's progress against professional practice goals, as recorded in the Professional Development Plan and Goal Setting for School and Learner Growth tables earlier in this document. Leaders and evaluators should then walk through the leader's end-of-year self-evaluation ratings so that the leader has the opportunity to share his or her thoughts on performance in each of the five summative performance categories and present evidence to support each rating.

Summative Conference Signatures of Agreement

Upon completion of the summative conference, the leader and evaluator should sign a completed version of this form that reflects their shared understanding of the leader's progress toward professional practice, learner growth, and school growth goals.

Leader Signature: _____

Date: _____

Evaluator Signature: _____

Date: _____

Summative LEPG Rating of Leader by Evaluator

Soon after the summary evaluation conference, the evaluator should assign a final practice rating for each standard in the MSFE LEPG Rubric and calculate ratings in each of the five performance categories. The LEPG Rubric provides space to record these ratings in the “ratings worksheet” section following each Standard Indicator and includes a summary table to calculate average ratings on the last page. The leader’s evaluator should complete the summative ratings and rationale table below, referencing a copy of the LEPG Rubric and any collected evidence to inform ratings in each category.

The evaluator should provide the leader with this form, including the completed summative ratings and rationale table and the completed summative scoring matrix on the following page, and schedule a time to review the summative LEPG rating.

The evaluator should consult the *LEPG Model Program Guide* for more detail on the summative scoring process.

Evaluator’s Summative Ratings and Rationale

Professional Practice		Evidence Evaluated	LEPG Rating
<i>Strengths</i>	<i>Areas for Improvement</i>	<i>Summarize evidence below</i>	<i>Circle rating for each category.</i>
			Overall rating reflecting performance on Core Propositions 1–6 of the MSFE LEPG Rubric Ineffective = 1 Developing = 2 Effective = 3 Distinguished = 4
Professional Growth		Evidence Evaluated	LEPG Rating
<i>Strengths</i>	<i>Areas for Improvement</i>	<i>Summarize evidence below</i>	<i>Circle rating for each category</i>
			Overall rating reflecting performance on Core Proposition 7 of the MSFE LEPG Rubric Ineffective = 1 Developing = 2 Effective = 3 Distinguished = 4

To be filled in by evaluator based on the summative conference

School Conditions		Evidence Evaluated	LEPG Rating
<i>Strengths</i>	<i>Areas for Improvement</i>	<i>Summarize evidence below</i>	<i>Circle rating for each category</i>
			Overall rating reflecting school employee's report of school climate Low = 1 Low average = 2 High average = 3 High = 4
School Growth		Evidence Evaluated	LEPG Rating
<i>Strengths</i>	<i>Areas for Improvement</i>	<i>Summarize evidence below</i>	<i>Circle rating for each category</i>
			Overall rating reflecting progress on school goals Did not meet = 1 Partially met = 2 Met = 3 Exceeded = 4
Learner Growth		Evidence Evaluated	LEPG Rating
<i>Strengths</i>	<i>Areas for Improvement</i>	<i>Summarize evidence below</i>	<i>Circle rating for each category</i>
			Rate performance for each measure and average. Did not meet/low = 1 Partially met /low average= 2 Met/high average = 3 Exceeded/high = 4

To be filled in by evaluator based on the summative conference

Summative LEPG Rating Scoring Matrix

Using the summative ratings and rationale table on the previous pages, the evaluator should record the leader's summative ratings in the matrix for each category to calculate the final summative LEPG Rating. Please note that this table provides one possible option for weights for each category or measure.

Summative LEPG Rating Scoring Matrix				
Performance Measure	Results		Weight	Weighted Results
Professional Practice Rating		X	0.40	=
				+
Professional Growth Rating		X	0.10	=
				+
School Conditions Rating			0.10	
School Growth Rating		X	0.15	
				+
Learner Growth Rating		X	0.25	
				=
			LEPG Rating	

To be filled
in by
evaluator for
final scoring,
based on the
summative
conference

Final Summative LEPG Rating Signatures of Agreement

Upon sharing the final summative LEPG Rating and meeting to discuss the rating, the leader and evaluator should sign a completed version of this form that reflects their shared understanding of the leader's final summative LEPG Rating.

Leader Signature: _____

Date: _____

Evaluator Signature: _____

Date: _____

Plans and Pathways

Leaders may use this last section of the form to record their initial thoughts for next year's professional growth plan, based on the current year's summative evaluation score. In the following school year, leaders will revisit this completed section to inform their self-reflection and self-evaluation for the beginning-of-year conference.

Check the box for the leader's plan type:

- ☐ Individualized Growth Plan³
- ☐ Monitored Growth Plan (i.e., Improvement Plan)⁴

Preliminary Professional Growth Planning for Next School Year

Goal (briefly note idea for goal here)	Implementation Strategies and Evidence of Progress (What will the leader do? AND What evidence will the leader collect to show goal has been met?)
Builder Goal:	
Extender Goal:	

To be filled in
by leader at
the end of the
year to plan
for the
following
year's growth
and
evaluation

³ For leaders who received a "proficient," or "distinguished" rating in the previous year.

⁴ For leaders who received a "developing" or "ineffective" rating in the previous year. Leaders rated "ineffective" might have two "builder" goals instead of one "builder" and one "extender" goal.